The Alberta Academy For Educational Leadership

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Alberta Education

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EDUCATION

87-05415/

THE ALBERTA ACADEMY FOR EDUCATIONAL LEADERSHIP

REPORT OF AN APPRAISAL

by

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(Under contract to Alberta Education, Edmonton, Alberta)

Note: The views and recommendations expressed in this report are those of the researchers -- not necessarily of Alberta Education. (L. W. Downey, Chief Investigator)

January, 1987

THE ALBERTA ACADEMY FOR EDUCATIONAL LEADERSHIP: REPORT OF AN APPRAISAL

FOREWORD: ABSTRACT AND ACKNOWLEDGEMENTS

At the outset, we wish to express appreciation to the many individuals and groups who contributed data for our appraisal of the Academy for Educational Leadership and opinions regarding the Academy's future. The list is a long one: the Director of the Academy, the secretariat, and staff of facilitators; participants in Academy programs; individual superintendents and trustees; the Alberta Teachers' Association; the Association of School Business Officials of Alberta; the Alberta School Trustees' Association; the Council on School Administration; the Council of Alberta School Superintendents; and the Academy's Policy Advisory Committee.

Participants in and observers of Academy programs provided us with much of the information required to judge the Academy's effectiveness. The final "report card" is indeed impressive. The Academy's general rating, in terms of its ability both "to do the right things" and "to do things right" is approximately 9.0 on a 10-point scale (aggregated data).

On the basis of such data, one can only judge the Academy's three-year exploratory venture to have been an outstanding success. Though its clients have been few in number, the Academy's impact upon educational leadership in Alberta

has been significant. Furthermore, the Academy project has demonstrated that a certain type of leadership development program is needed in Alberta, and when delivered effectively, is highly valued. That lesson must not be lost, now that the exploratory phase has ended.

Despite the success of the exploratory venture, however, stakeholder groups have continuing concerns about the locus and the governance of the Academy. Indeed, most stakeholder groups -- including the Alberta School Trustees' Association, the sponsor of the Academy experiment -- expressed to us the desire that Academy-like programs now be subsumed under some sort of umbrella organization such as the proposed Alberta Consortium for the Development of Leadership in Education. Our recommendations on this matter follow the views of the stakeholder groups.

It is a source of great satisfaction to evaluators and policy advisers when they can obtain both conclusive data for an evaluation and consensus on future policy recommendations. The forthrightness and good will of the individuals and groups with whom we worked enabled us to do both of these things. We enjoyed the process; we are pleased with the outcome; and we are grateful to all who assisted us.

L. W. Downey
and
E. J. Ingram

THE ALBERTA ACADEMY FOR EDUCATIONAL LEADERSHIP

A REPORT OF AN APPRAISAL

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I.

THE STARTING POINTS:
THE DESCRIPTIVE DATA AND THE FOCUS OF THE APPRAISAL

The Alberta Academy For Educational Leadership has now operated for what was originally planned as a three-year exploratory period. It has offered six one-week programs for principals, with 283 participants, and one one-week program for school board chairmen and vice-chairmen, with 34 participants.

The appraisal reported here began, as originally planned, immediately upon the completion of the programs offered in the third year.

This introductory section sets out the starting points of the appraisal -- descriptions of how and why the Academy came into existence, the purposes of the appraisal, the methods of data collection and analysis, and the approaches to judgment, to the conception of alternative futures, and to recommendations.

1. The Origins of the Academy

Before one can begin to become appraisive about a youthful project such as the Academy, one must take stock of its origins: what its antecedents were, how it was created and by whom, what its role and purposes were to be, and what the hopes were for its future. The Academy began operations in 1984; but the events that led to its creation were set in motion in 1980. A brief chronicle of these events seems to be one of the important starting points.

- In the spring of 1980, the Minister of Education announced his intention to introduce legislation specifying the role of the principal. The ASTA, however, persuaded the Minister to postpone his legislative amendments -- on the understanding that the ASTA would spearhead a province-wide activity designed to take stock of the role of the principal and methods for its enhancement.

- In the spring of 1981, the ASTA produced a commissioned discussion paper, **The Role of the Principal**, which was subsequently distributed throughout the Province. Responses were invited.

- In December, 1981, the ASTA established a Task Force on the Role of the Principal with representation from all stakeholder groups.

- Between January and June, 1982, the ASTA conducted a survey of all superintendents to determine what the reactions were to the discussion paper.

- In June, 1982, the Task Force submitted to Alberta Education a proposal to conduct a policy development project. The proposal was accepted and a series of policy-development workshops were held throughout the Province.

- In the summer of 1983, the study of the role of the principal terminated and the Task Force began its final deliberations.

- In July of 1983 the Task Force recommended among other things the development of annual summer institutes designed to prepare novice principals for their new roles and to aid experienced principals in becoming more effective leaders.

- In early 1984 the Task Force was disbanded. The proposed institutes were subsumed in the concept of an Academy for Educational Leadership, and the Task Force was replaced by a Steering Committee representative of ASTA, CASS, ATA,

CSA, Alberta Education, and the Universities.

- The Academy's first program was offered in the summer of 1984; three were offered in the summer of 1985; and two were offered in the summer of 1986. Also, in November of 1985 a program was offered for school board chairmen and vice-chairmen.

- In January, 1986, in accordance with the original plan, the Academy requested Alberta Education to sponsor an external evaluation.

While these events were unfolding, other activities were serving to complicate the role and status of the Academy. Some observers, for example, were wondering aloud why a provincial association of school trustees should be sponsoring and organizing leadership development programs for principals. Others were wondering, also aloud, how the Academy's programs would and/or should fit into the larger scheme of opportunities offered by the Universities, by local school authorities, by the professional association of administrators, and by others. These and other concerns were reflected in two other developments.

- In January, 1986, a proposal known as FELA (Foundation for Educational Leadership in Alberta) was considered in a meeting of various stakeholder groups.

- Subsequently, a study committee was established to examine the FELA proposal in detail and explore other approaches. That study committee has now submitted its final report and has recommended the creation of a Consortium for the Development of Leadership in Education.

As our statement of purposes to follow will clearly indicate, all of the above events and developments had profound implications for the conduct of appraisal reported here.

2. Purposes and Focus of the Appraisal

Five problematic issues set the purposes of the appraisal. Four of them relate to the effectiveness of the Academy's programs themselves -- their goals, themes, and processes; one relates to the Academy's place in the larger scheme of things.

Specifically, the purposes were to assess:

1. the impacts of the Academy experience upon subsequent leadership behavior and effectiveness of principals;
2. the appropriateness of the Academy's philosophy and goals;
3. the timeliness of the Academy's themes;
4. the effectiveness of the Academy's processes; and
5. the Academy's fit in the larger scheme of things -- how it complements other leadership development opportunities in the Province and/or deals with its "critical competitors."

Each of these issues is suggestive of a set of evaluative research questions; each question, in turn, is suggestive of sources of data.

1. Impacts Upon Subsequent Leadership Behavior. Preliminary, on-site observations of the Academy in operation (by the Chief Investigator) and reviews of internal evaluations, conducted upon the completion of the various programs, could have led us to conclude that the Academy's programs are unqualified successes. Levels of intensity, enthusiasm, and satisfaction were observed to be unusually high -- compared to those witnessed in other comparable programs. Also, immediately upon program completion, participants judged the programs to have been very, very effective. What we could not know for sure, however, was whether or not programs tended to have lasting effects and did, indeed, influence the on-the-job behavior of graduates.

Through methods to be described later, we sought to obtain evidence to address such first-order evaluative questions as: How lasting or real are the benefits of programs? What sorts of on-the-job behavioral changes can be credited to the Academy's programs? Both the reflections of past participants and the observations of persons with whom they work were used to address these questions.

2. **Philosophy and Goal Appropriateness.** What might be termed the "Academy's philosophy" is embodied in statements about its culture, its strategies, its vision of effective leadership -- and what has come to be known as "the Academy way." That so-called Academy way is personified in the Director and the staff of Facilitators he assembles for each program. Clearly, the modeling of the Academy way -- with its emphasis upon leadership style, values, culture, warmth, and personal growth -- is fundamental to the Academy's belief system.

Since its inception, the Academy's stated goals have remained fixed -- namely, to provide for participants: (1) the opportunity to develop and enhance their leadership skills; (2) the opportunity to become informed of emerging trends; (3) a setting conducive to linking theory to practice; (4) the opportunity to work collaboratively on issues, challenges and problems; and (5) the opportunity to develop, with peer assistance, plans-of-action to be implemented in their own schools. The Academy has regularly attempted to assess levels of goal achievement as perceived by participants immediately upon program completion. And, as we shall report later, the assessments of participants have been very high.

As one reflects upon the Academy's philosophy and its expressed goals, one cannot but wonder, however, if its expressed goals are its real goals -- and, indeed, if they are not, what its real goals are and which are more appropriate.

Such reflections suggested that further probing needed to be undertaken to determine exactly what goals are set by the Academy, how appropriate these goals are, and how compatible they are with the goals that participants bring with them to the Academy.

3. **Theme Appropriateness.** Unlike the goals, the themes adopted by the Academy change somewhat from progam to program. Such thematic changes appear to be determined, in part, by emerging thought in the field of leadership and, in part, by the preferences of the leadership team. We asked: Are the themes selected the best or most appropriate ones?

Two sources of information were used in addressing this question: (1) the views of participants as to how relevant the chosen themes were to their needs; and (2) the opinions of experts, as expressed in the literature, as to how current the chosen themes were in light of emerging thought in the field.

4. **Process Effectiveness.** The process adopted by the Academy in its intensive, six-day programs is clearly reflective of its philosophy: (1) the over-arching objective of the leadership team is to develop a spirit, to capitalize on the power of the group, and to maximize interactions with peers; (2) each day's theme evolves systematically -- from a major presentation, to analyses of relevant sections of the text, to a case study, to individual planning and reflection, and (3) throughout, there is a continuing effort to build a climate and a culture which reflects the philosophy.

The work-day is divided roughly as follows: (1) plenary sessions on daily themes -- 23.8% ; (2) case studies related to themes -- 32.6% ; (3) text book study and discussion -- 9.9% ; (4) individual planning for entry into a new position,

for leadership skill development, and for effectiveness planning -- 33.7 %.

As indicated, participants appear to respond well to the philosophy that drives the process and to engage in the process itself with great enthusiasm. Furthermore, when a program ends, the participants appear to be almost unanimously pleased with the experience they have just had.

Again, what we thought was needed was an opportunity for participants to reflect upon the process and re-assess its effectiveness after the initial enthusiasm had faded.

5. **The Academy's Fit in the Larger Scheme of Things.** One could (and it appears that people do) adopt two quite different views of the Academy's place in the general scheme of things. One view is that the Academy is its own agency, free to do what it deems appropriate and to deal with other agencies on a purely competitive basis. The other view is that an Academy-type program is really a part of a network of activitiess and ought to be seen as complementary to other programs in the network.

We decided we should attempt to learn: (1) who comes to the Academy and with what kinds of educational backgrounds; (2) what other kinds of self-development activities they engage in; and (3) what relationships, if any, clients and stakeholder groups see between the work of the Academy and other leadership development activities. We decided we should also attempt to arrive at some estimate of the comparative cost/effectiveness of the two views -- the competitive and the complementary.

This last problematic issue has troublesome political overtones. Traditionally, such agencies as the Universities, the Alberta Teachers' Association, the Council on

School Administration, the Council of Alberta School Superintendents, local School Districts, and others have assumed that they have legitimate "claims to some of the turf" -- proper roles in the over-all task of leadership development. So we asked: What is the Academy's role in this larger scheme of things? Is it just a small cog in a larger machine -- offering its own unique programs to a few individuals? Or is it the pace-setter -- working at the cutting edge of new developments? What are the views of stakeholder groups with respect to these two questions? How can they be accommodated in a plan for the Academy's future?

3. Methods of Data-Gathering And Analysis

Eight methods of data-generation were used in this appraisal. Each produced information useful in dealing with specific questions; together, they produced information useful in dealing with the more general questions.

1. On-site observations of the Academy in operation between August 2 and 16, 1986.

2. Meetings with graduates in Calgary, Red Deer and Edmonton -- for purposes of questionnaire refinement and assessments of attitudes.

3. Questionnaire to graduates. The return rate was 195 of 273 for a total of 74.1 percent.

4. Questionnaire to superintendents. The return was 83 of 92 for a rate of 90.2 percent.

5. Questionnaire to school board chairmen and vice-chairmen who participated in the Nov., 1985 program. The return rate was 21 of 34 or 62 percent.

6. Meetings with selected school staffs and colleagues to determine their perceptions of the impacts of the Academy experience upon graduates.

7. Meetings with stakeholder groups to determine their reactions to the evaluative data and their views of the Academy's role in the future.

8. Interviews with participants and interested observers.

How the data generated by these activities were used in our approaches to judgment will be clarified later in the report. One observation, however, needs to be made here: Data having to do with the effectiveness of the Academy, though largely perceptual in nature, may, nevertheless be regarded as persuasive appraisive data; such data had important implications for our assessment of what the Academy does and how it does it. Data having to do with the Academy's place in the larger scheme of things are of three types: (1) historical data on past practices and relationships; (2) literature-based data reflecting the views of so-called experts; and (3) opinion data reflecting the views of stakeholder groups.

4. Overview

The next section of the report provides the appraisive data which are the data basic to judgments about the effectiveness of the Academy itself.

Section III proceeds to the more normative, prescriptive or decision-based data -- concepts of alternative futures for the Academy, the views of stakeholder groups and assessments of the robustness of alternative futures.

Finally, Section IV presents a summary, some speculations, and recommendations.

II.

TOWARD JUDGMENTS OF THE ACADEMY'S EFFECTIVENESS: THE APPRAISIVE DATA

Subsequent to our observations of the two Academy programs offered in the summer of 1986, we engaged in a series of data-gathering activities calculated to provide us with a basis for forming judgments about the Academy's effectiveness.

1. The design of a questionnaire to obtain the back-on-the-job views of graduates.

2. The conduct of three zone meetings as occasions to test the questionnaire and also to receive first-hand impressions from about 50 former participants.

3. The design of a questionnaire to solicit the views of superintendents.

4. The design of another questionnaire to solicit the views of school board chairmen and vice-chairmen who attended the program especially designed for them in November, 1985.

5. A review of the current literature on leadership and leadership development and a comparison of the dominant themes in the contemporary literature with the themes adopted by the Academy.

6. Selective interviews with the teaching staffs of schools whose principals participated in Academy programs.

The outcomes of each of these appraisive data-gathering activities are reported here.

1. The Views of Participants: What the Graduates Say

After each of the six Academy programs for principals, an evaluation was conducted in which participants were asked to rate the program for effectiveness. The results of those evaluations are instructive and very much worthy of note. However, each was conducted in the euphoric environment of a "final day." So in an effort to determine how lasting the participants' views were, and also to address some other measures of perceived effectiveness, we conducted our own follow-up questionnaire survey. Here we present and compare our summary of previous evaluations and our own follow-up survey.

1. Summary of Past Evaluations. At the termination of each program, participants have regularly been asked to assess the effectiveness of the program in terms of: goal attainment; program effectiveness; suitability of themes; program processes; and the scheduling of activities.

- **Goal Attainment.** When asked to estimate the level of goal attainment on a five-point scale (from 1: very low to 5: very high), the collective judgments of participants were as follows:

1. Informed of emerging trends	4.2
2. Linking theory to practice	4.5
3. Cooperative solutions of problems	4.5
4. Peer assistance in problem solving	4.3
5. Orientation to a new role	4.4

- **Program Effectiveness.** When asked to rate the level of program effectiveness, again on a five-point scale -- in terms of relevance, substance, practicality, interest, understandability, innovativeness, focus, interactiveness and diversification -- the responses were again high, from a low of 4.2 to a high of 4.57 and an average rating of 4.45.

- **Program Themes.** When asked to assess the themes of the Academy's programs in terms of relevance and appropriateness, the following emerged as the important thematic clusters:

1. The Person	--	Principal as visionary
2. The Role	--	Principal as leader
	--	Principal as staff developer
	--	Principal as staff supervisor and evaluator
3. The Tasks	--	Instructional program management
	--	Strategic planning
	--	Differentiated supervision

Clearly, these clusters of themes are neither discrete nor mutually exclusive. They are, however, indicative of what Academy participants value in the programs.

- **Processes.** The processes or activities of the Academy programs were assessed on a four-point scale (from 1: very poor to 4: very high). The results were:

1.	Large group sessions	3.3
2.	Case studies	3.2
3.	Small groups	3.5
4.	Textbook study	2.4

It is interesting to note that the textbook study aspect of the process emerged as a poor fourth. We suspect the reasons for this are, in part, embodied in the next set of data -- on scheduling.

- **Scheduling.** When asked if the program scheduling was "about right" or "too tight" participants reacted as follows:

1.	About right	102
2.	Too tight	40

Comments regarding this question indicated that participants had little time to attend to the required reading and absolutely no time for recreation -- such as,

"using the golf course at their back doors."

2. **The Follow-Up Survey**. Two months after the completion of the 1986 summer programs, we distributed a questionnaire to the 273 principals and vice-principals who had participated in Academy programs during the three-year exploratory period, 1984 to 1986. Ten of the questionnaires were not delivered by Canada Post. But 195 were completed and returned for a return rate of 74.1%.

- **Profiles of Participants**. The typical participant in Academy programs for principals is a male -- though some (15%) are females. The majority (44%) tend to hold the masters degree -- though many (34%) hold only the bachelor's degree; some (17%) hold the graduate diploma; and a few (2%) hold the doctorate. The area of specialization in graduate studies tends to be Administration (44%) -- though many (37%) specialized in either elementary or secondary education and a few (19%) specialized in other fields. The typical amount of administrative experience is between nine and ten years -- but many (16%) come with less than two years experience and some (4%) with more than 20 years experience. The typical school being administered by participants in Academy programs has a full-time teaching staff of 19 -- but some (13%) have fewer than ten teachers, and others (7%) have more than seventy. The average age of participants is 43 -- but a few (7%) are under 35, and some (14%) are over age 50. The majority (52%) came from medium-size jurisdictions -- between 100 and 700 teachers; many, however (27%) came from large jurisdictions -- over 700 teachers; and 18% came from small jurisdictions -- fewer than 100 teachers.

- **Positive Aspects of the Academy Experience**. When asked to recall the three most positive memories of the Academy experience the respondents gave us the following. (Note: Frequencies were aggregated to provide a percentage break-down.)

1. The opportunity to interact, to share, and to test ideas on peers 32%
2. The processes of the Academy program, how it does things 24%
3. The ambience of the Academy, its culture, its environment 20%
4. The vision, the inspiration of the Academy experience 17%
5. The retreat setting 4%
6. Leadership 3%

What seems abundantly clear in these data is that participants value the opportunity to interact with their colleagues, in a professional development process that facilitates interaction, and in a culture in which visioning and sharing are paramount.

- **Negative Aspects of the Academy Experience.** When asked to recall the most negative memories of the Academy experience, the responses were:

1. Exhausting schedule 24%
2. Accommodations 18%
3. Inflexibility of groupings 13%
4. Timing 8%
5. No negative memories 7%
6. Non-implementability of ideas 7%
7. Too much "religious zeal" 5%
8. Initial insecurity 4%
9. Other (aspects of the program such as, speakers, cases, text, cost) 14%

- **Application of Knowledge.** Respondents were asked to indicate on a five-point scale (from 1: not at all, to 5: very much) the extent to which knowledge gleaned from the Academy experience was subsequently applied to their work as principals. The results were as follows:

1. Not at all 1%
2. A bit 2%

3.	Marginally	. . . . . 19%
4.	A good deal	. . . . . 54%
5.	Very much	. . . . . 24%

The median score on this five-point rating scale was 4.0 -- essentially an 80% positive rating, in terms of the applicability of the knowledge acquired.

- **Influence Upon Leadership Style.** Respondents identified six major ways in which the Academy experience influenced their leadership styles.

1.	Made me more visionary	. . . . . 28%
2.	Increased my confidence	. . . . . 22%
3.	Improved my interpersonal skills	. . . . . 17%
4.	Improved my supervisory skills	. . . . . 17%
5.	Made me more flexible	. . . . . 13%
6.	Improved my skills in community involvement	. . . . . 3%

- **Attitude Toward A Return To The Academy.** More than 75% of our respondents indicated they have considered returning to the Academy for another program -- and indeed would like to do so. Only five percent said they would not consider returning under any circumstances. The remainder (roughly 20%) said they would return under certain conditions.

Those who have a positive attitude toward a return to the Academy see it as an effective refresher experience of comparatively high quality. Those who are negative simply do not want another experience of this kind. And those who are doubtful wonder if another experience might not be redundant and of marginal cost/effectiveness -- unless they were moving to a new position.

- **Advice To A Colleague.** When asked if they would recommend the Academy experience to a colleague, most (over 95%) said "yes"; only three of the 192 said "no"; but a few said "maybe -- under certain conditions" or "I am not

yet sure." On a 5 point scale the mean response was a very positive 4.9. The comments following responses to this question were instructive. Those who indicated they would strongly recommend the Academy experience to a colleague used such expressions as: "This is a great opportunity for personal growth" and, indeed, "It is so good it ought to be made mandatory." Those who indicated they would not recommend an Academy experience to a colleague clearly did not value the experience themselves. Those who were undecided or conditional in their response seemed to be troubled by what they perceived to be a lack of focus. So they said: "The programs need to be targeted upon specific individuals and their specific needs."

- **The Culture of The Academy**. When asked to rate the culture of the Academy as an environment for professional growth, respondents were very positive. On a five-point scale (1: very poor to 5: very good) the median rating was 5.0 and the mean was 4.7. Two major aspects of the culture contributed to the positive ratings: (1) the live-in, total immersion feature of the experience; and (2) the sharing-with-peers aspect of the program. The few negative comments had to do with (1) the physical accommodations, (2) the "religious zeal" that mounted during the program, and (3) the lack of direction from leadership.

- **Goal Attainment**. We asked graduates of Academy programs to indicate the extent to which goals were achieved. The five goals and the composite ratings on a 4-point scale (from 1: goal very poorly met to 4: goal met very well) were as follows:

1. To develop and enhance leadership skills 3.6
2. To become informed of emerging trends 3.4
3. To become able to link theory to practice 3.5
4. To develop cooperative

	solutions to problems	. . . . . 3.8
5.	To obtain peer assistance in developing plans of action	. . . . . 3.5
6.	To assist participants in meeting their own personal goals	. . . . . 3.5

Comments regarding #6 above -- the extent to which participants realized their own personal goals -- were mixed. Some said they tended to assume the Academy's stated goals and allow their own personal goals to take shape as the program unfolded. Others said that the Academy's goals were not very much individualized, and, hence, that it was difficult to know for sure how much their own goals had been realized.

• **Processes And Activities.** When asked to rank the various Academy activities, again on a five point scale (from 1: not very good to 5: very good) as contributors to professional development, the results were as follows:

Rank	Activity	Weighted Scores
1.	Plenary Sessions on Themes	4.1
2.	Case Studies	3.9
3.	Individual Planning	3.3
4.	Social Activities	2.3
5.	Work on Textbook	2.3

• **Time Allocations.** Respondents were then reminded of the time allocated to each of the five activities and asked to indicate if they thought the time allocation for each activity was about right, should be increased, or should be decreased. The responses were as follows:

Activity	Allotment	Right	Increase	Decrease
1. Plenaries	23.8%	75%	15%	8%
2. Cases	32.6%	56%	15%	28%

3. Individual Planning	33.7%	53%	25%	21%
4. Social	Unscheduled	64%	30%	3%
5. Text	9.9%	60%	12%	26%

It should be pointed out that in the above calculations, social and recreational activities were not estimated as part of the work day; they were largely unscheduled; and time spent on such activities varied from individual to individual. Responses to this question, however, tend to corroborate findings reported earlier -- namely, that participants find the schedule to be very tight and would appreciate more time for social and recreational activities. Their views about time allocations to various activities invite speculation. For example, though case studies as an activity ranked a high second, 28% of the respondents would decrease the time allocation to cases. Also worthy of note, is the fact that while individual planning ranked a fairly strong third, respondents are divided as to whether the time allocation should be increased or decreased.

• **The Academy And Other Professional Development Activities.** Finally, Respondents were asked to compare the Academy experience with twelve other activities they might have undertaken -- by indicating on a three-point scale (1: not useful to 3: very useful) the value they placed on the various activities in which they had engaged. (Note: Cases of N.A. were excluded from the analysis.) The results were as follows:

Rank	Activity	Mean
1.	Academy Program	2.9
2.	Other Self-Initiated Activities	2.6
3.	District Programs	2.5
4.	Readings	2.5
5.	University Residence	2.4
6.	University Courses	2.3

7.	Other Short Courses	2.3
8.	Conventions	2.3
9.	Western Can. Admin. Conf.	2.3
10.	C.S.A. Programs	2.3
11.	Professional Meetings	2.3
12.	Pro. D. Days	2.2
13.	Teachers Conventions	1.9

The pattern of these data is instructive. The Academy is a clear winner, in the view of participants, with a score of 2.9 on a three-point scale. A close second, however, are self-initiated activities -- which probably ought to be seen as closely related to the fourth-ranked activity, namely, individual readings. District sponsored programs rank third, while University offerings rank fifth and sixth.

• **Notable Variations.** We ran cross-tabulations to determine whether or not there were differences in respondents' perceptions associated with such variables as: (1) age, (2) experience, (3) amount of previous university education, (4) size of jurisdiction, (5) job type -- whether in-school administrator or other, and (6) role in the Academy -- whether participant or facilitator.

Not surprisingly, because the composite responses were skewed so overwhelmingly toward the positive, differences were few and marginal in significance. The following, however, are noteworthy.

1. No differences in opinion were associated with age, length of experience, or size and type of jurisdiction.

2. The lower the level of university education of respondents, however, the higher they valued the Academy as an environment for professional development.

3. Also, respondents who hold in-school administrative positions (principals and vice-principals) valued the environment of the Academy more highly than did out-of-school administrators.

4. Finally, one of the most intriguing differences in opinion revealed in the data were the differences between participants and facilitators. Facilitators, as a group, tend to have higher university credentials, to have longer and broader experience, and to come from larger jurisdictions. Also, they tend to be hand-picked by the Director. So one would expect them to be very positive about the Academy experience. But the data were to the contrary. Indeed, one facilitator rated many aspects of the Academy very negatively (one on a 4-point scale); criticized the Academy for its so-called "religious zeal;" and claimed (s)he would not recommend the Academy to a colleague.

As indicated, these variations in the data are not of great magnitude. They do, however, appear to explain the few minor exceptions to the generally positive quality of the responses.

3. **Comparisons: Estimates of Slippage.** Now we ask: can useful comparisons be made between our evaluative data and those data that were generated by evaluations held at the conclusion of each course? Has there been slippage? Were the judgments of the respondents to the post-program evaluations influenced by the "last day euphoria" that is characteristic of Academy programs? How might their responses differ after a time lapse?

At the outset it must be made clear that our purpose was not simply to replicate the post-program evaluations. Indeed, the purposes were quite different. The post-program evaluations were conducted to obtain participants' views of the effectiveness of the various aspects of the Academy programs -- so that the Director might use these views to fine-tune future programs. The purpose of our evaluation, in contrast, was to assess the Academy's impacts upon participants -- so that we might make judgments about the Academy.

However, some comparisons are possible. In particular, the matter of slippage can be addressed.

- **Goal Attainment.** Curiously enough, in the matter of goal attainment, there was no slippage. On the contrary, estimates of goal attainment rose from an earlier 3.49 (on a 4-point scale) to 3.56.

- **Effectiveness.** In earlier evaluations, participants were asked to rate the over-all program. The average rating on a 5-point scale was 4.45. We subsequently asked them to rate the over-all Academy as an environment for professional growth. The average rating was 4.7.

- **Processes And Activities.** In both evaluations, the processes and activities were ranked in the same way. And in both evaluations, there appeared to be a fairly widely-held view that activities were a bit tight. Our evaluation added some insights: (1) participants would like more social and recreational time; and (2) though certain activities are highly valued, participants would prefer that such activities be allocated less time.

2. The Views From Above: What the Supervisors Say

We distributed a one-page questionnaire to all of the superintendents who were listed as the direct supervisors of the principals who attended Academy programs over the three-year exploratory period.

A total of 92 questionnaires were distributed. The returns numbered 83 for a return rate of 90.2 percent.

The superintendents were asked three questions having to do with their views of the Academy as an opportunity for the professional growth of principals. (They were asked two other questions having to do with the Academy's place in the larger scheme of things. Their responses to these questions will be reported later.) The three evaluative questions were:

1. Why did you support the applications of the principals who applied from your jurisdiction?

2. Were your hopes met? Did the program make a difference?

3. How would you rate the Academy experience, in terms of cost and benefits, in comparison to other leadership development activities to which your principals have access?

The first question was calculated to inform us of the superintendents' **expectations** of the Academy; the second, to provide us with their appraisive judgments as to its **effectiveness**; and the third, to give us their estimates of its **cost/effectiveness**.

• **Expectations.** When asked why they supported the applications of principals, their responses fell into six major categories:

1. They were pace-setters 36%
2. They, like everyone else, needed periodic self-renewal 23%
3. They had problems 13%
4. They wanted (needed) particular skill development 10%
5. No particular criteria 9.5%
6. They were beginners 8.5%

• **Assessments of Effectiveness.** When asked if their hopes had been met, whether or not there were observable changes in performance, they responded as follows:

Yes 84% No 7% Too early to tell 9%

The superintendents' comments related to this question were very informative. On the positive side, they cited three major ways in which their hopes had been met, in which change could be observed:

1. There was observable **personal growth**. Increased enthusiasm and confidence. A new vigor. A new sense of perspective. A new proactivity. A new receptivity to suggestions and criticism 50%
2. There was an increase in **knowledge**. Concepts of what an effective school is. How to plan. How to change. How to deal with public relations 33%
3. There were observable improvements in **performance**. Supervisory skills. Building cohesiveness. Developing goals. Communications. Staff relations 17%

On the negative side, superintendents noted only 6 cases in which they were disappointed -- ways in which their hopes had not been met.

1. Superficiality. Observable differences only in enthusiasm, not in performance . . . . . 2 cases
2. Impact is upon one individual. Does not spill-over to the district as a whole . . . . . 1 case
3. Only good for the pace-setter, not for the weak . . . . . 3 cases

• **Estimates of Cost/Effectiveness**. When asked how they would estimate the cost/effectiveness of the Academy experience, on a 1 - 5 scale, in comparison to other leadership development activities, the superintendents' responses were as follows:

Rating:	1.	2.	3.	4.	5.
Frequency:	0	1	7	38	31

General Estimate 4.25

Superintendents who assigned a high cost/effectiveness rating offered a number of informative explanatory comments:

1. Length and intensiveness of the six-day program make it more effective than most other things . . . . . 22 cases
2. The networking that results from an Academy experience is, itself, very cost/beneficial . . . . . 4 cases
3. The methods are different -- but obviously effective . . . . . 11 cases
4. Programs are expensive -- but worth the investment . . . . . 10 cases

Superintendents who assigned lower cost/effectiveness ratings offered the following comments:

1. The programs are just too expensive . . . . . 5 cases
2. Benefits are to individuals, not systems . . . . . 3 cases
3. Prefer the broader point of view as supplied, for example, by universities . . . . . 1 case
4. Courses are too intensive. They should be spread out over a year. . . . . 2 cases

• **Summary**. Clearly, the superintendents' views of the Academy, as an opportunity for the professional growth of principals, are generally positive. Their views, of course, are based largely -- though not exclusively -- upon the views "brought back" by their principals. Hence, one cannot but wonder if an Academy experience is not basically an experience in personal growth -- an experience which causes a "fired-up" principal to either begin or renew his/her career.

3. The Views of Experts: What the Literature Says

The Academy is guided by a very distinctive view of what leadership is and how it can best be developed; that view is reflected in what is referred to as "the Academy way." Also, for each program the Academy adopts a set of themes which

are thought to be the appropriate leadership themes. And the Academy follows certain processes which are thought to be conducive to leadership development.

Earlier, we reported the views both of participants in Academy programs and of their supervisors as to the appropriateness of the philosophy and themes and the effectiveness of the process.

Now we ask: What would the experts in the field have to say about these matters? To answer this question, we conducted a review and synthesis of the current literature on leadership and leadership development. A summary of that review is presented here -- to provide another kind of back-drop against which to assess the Academy. (The complete review, entitled **Leadership And Leadership Development**, by Averlyn Gill, is available upon request from Alberta Education.)

1. **Views Of Leadership.** Students of leadership have always had great difficulty in laying firm hold of the concept. Most think they recognize it when they see it; but they are at a loss to define it. The simple preliminary definition which most would accept is: **leadership is the ability or potential to influence other people in the attainment of a desired end or goal.**

Different scholars think that that ability is rooted in different factors. Some think that leadership is ascribable to certain **attributes** and skills which set the stage for leadership-like actions. Others see leadership as a **process** of **exchange** between the leader and the led. Still others view leadership as the performance of particular **activities or tasks.** And still others think of leadership as all of the above (an eclectic view) as applied to a particular **context.**

It seems neither instructive nor useful to opt for any one of these views to the exclusion of others. Indeed, each has generated certain themes that seem worthy of consideration.

• **Leadership as Attributes and Skills.** This view of leadership is not unlike the old traitist view -- the notion that leadership is essentially the skills, talents, and traits that the individual brings to the task. But some new attributes have been added. Contemporary scholars who adhere to this view of leadership would describe the leader in the following terms.

1. The leader is a **visionary** -- one who engages in speculations about future states of affairs and holds a clear vision of where the organization should be in the future.

2. The leader is an **analyst** -- one who can make sense of complex situations and, as a consequence, can act thoughtfully in the performance of the leadership function.

3. The leader has **humanistic values** and displays these in interpersonal relations.

4. The leader has well-developed **political** and **communication skills.**

5. The leader is at ease with **change** and the **ambiguity** that often attends change.

6. The leader assumes **power** with ease and uses that power to advance the cause of the organization.

7. The leader uses all of the above skills and attributes to develop a **charisma** which causes followers to want to be led.

• **Leadership As An Exchange Process.** Scholars who ascribe to the exchange view of leadership argue that the phenomenon called leadership cannot be comprehended simply by examining the person who presumably is a leader. Instead, they hold, leadership is a process of exchange between the leader and the led.

That process of exchange can and does take two forms: (1) **transactional leadership** -- in which bargaining is the mode of exchange and rewards are traded for commitments and effort; and (2) **transformational leadership** -- in which the mode of exchange is mutual stimulation and support and the outcomes are higher levels of self-esteem, trust, sense of mission. Students who hold the latter view of

leadership would argue as follows:

1. The **visioning** that is the hallmark of good leadership is not simply an attribute of the leader. Instead, it is only in the sharing of the vision and, indeed, encouraging others to help shape the vision and the agenda of the organization that true leadership is exercised.

2. Similarly the **culture-building** that is usually thought to be a function of leadership is not a one-man show. Instead, it occurs only when there are exchanges of trust, feelings of shared ownership, and an understanding that everyone has an equal stake in the enterprise.

3. The **learning** that takes place as the result of cooperation of leader and followers to achieve common goals is mutual.

4. Finally, the **power** that is essential to guide the organization is not held and guarded by any one individual. It too is exchanged and shared; individuals and groups are empowered to proceed with their own plans and decisions.

• **Leadership As The Performance of A Set of Tasks Or Activities.** Scholars who hold the tasks view of leadership tend to ask: What does a leader do? And they tend to divide the tasks of the leader into two major categories.

1. **Substantive** activities -- which have to do with the work of the organization: (1) setting goals, clarifying followers' roles, disseminating information, and facilitating work; (2) maintaining group activities, including managing conflict behavior, maintaining group cohesion and cooperation; and (3) representing the group in activities such as lobbying for resources, soliciting support, cooperation and information from other groups.

2. **Symbolic** activities -- which have to do with the creation of ideas, with explaining, justifying and legitimizing activities of the organization and what the leader does. These activities include using language, ceremony and ritual to convey the leader's intended meanings.

• **Leadership As A Composite of Attributes, Exchanges and Tasks -- In A Particular Context.** Scholars who take this eclectic view differ from views of others in one important respect: they hold that the leadership function differs from situation to situation; hence, it can only be understood when viewed in a context;

and styles of performance must be tailored to fit the context. They seek to identify aspects of the situation that influence a leader's behavior, for example the task structure, technology, interdependence of followers' needs, the leader position power, span of control, centralization and followers' characteristics such as needs, traits, expectations and competence.

2. **Views of Leadership Development.** The dominant issues on leadership development in the current literature stem from the dual perspective on leadership -- its substantive aspects and its symbolic aspects. Some authors make a sharp distinction between these two. Indeed, some refer to the substantive aspects as management and the symbolic aspects as leadership. All seem to agree that development programs which emphasize the substantive, as they tended to in the past, should now give way to programs that emphasize the symbolic.

Bennis and Nanus (1985), for example, claim that a major problem lies in the skills that are taught in management education. These training programs emphasize the acquisition of technical skills for solving structured programs, whereas leadership skills are required for working in complex and ill-structured problem situations. The distinction that they make is that management education caters to procedures and the routine while leadership education should cater to developing creative abilities and functioning in new situations. They identified four main strategies for leadership development: (1) managing attention through vision -- creating focus; (2) managing meaning through communication with followers, the building of trust and confidence in the community, inventing ways of influencing and organizing meaning among the followers; (3) managing the establishment of trust through thoughtful implementation of the vision; and (4) managing self.

Others, however, argue that for development programs to concentrate exclusively upon the skills associated with the symbolic aspects of leadership would

be to leave leaders without the essential skills of planning, organizing, controlling, evaluating and maintaining.

The message seems clear: both aspects of leadership are important; the symbolic, however, appears to be in greatest need of development. Following this line of thought, some developers have advocated the creation of programs made up of a series of modules, each of which would address a particular leadership area. Then, they suggest, it would be possible for trainees to be discriminatory and avail themselves of the modules which meet their specific needs.

3. **The Academy And The Views of Experts.** Our observations of the functioning of the Academy lead us to believe that the planners of Academy programs are in tune with the contemporary literature in the field of leadership. The Academy's themes do reflect modern thought regarding the attributes of leaders, the exchange processes that occur when leadership is exercised, and the substantive and symbolic tasks of the leadership role.

Also, it seems clear that the broad sweep of the Academy's programs reflect an understanding that programs of leadership development must be comprehensive -- must address both the substantive and the symbolic; must address the attributes of leadership, the exchange processes that are the essence of leadership behavior, the tasks that must be performed by leadership, and the unique contexts in which individuals function as leaders. This comprehensiveness of view is manifest in the Academy's activities: theme development, group work, and individual planning for back-on-the-job activities.

It must be recognized, however, that some participants in Academy programs and some observers have been upset by what they describe as the "touchy-feely" aspect of the Academy's culture and the so-called "religious zeal" that develops

over the course of the programs. In the context of the literature reviewed above, these observations seem explainable. The Academy does, indeed, emphasize the symbolic and transformational perspectives on leadership. And these inevitably are vision-oriented and person-oriented -- perhaps in the view of some, "religious" and "touchy-feely"-oriented. Persons who are critical of the Academy on these grounds believe that the substantive aspects of leadership theory are lost in the process. But then one must ask: Can Academy programs be all things to all people? Should the Academy's programs attempt to be comprehensive? Or should they aim to provide one aspect of leadership development -- to be supplemented by opportunities provided by other programs? We return to these questions later.

III.

TOWARD DECISION: THE PRESCRIPTIVE DATA

ALTERNATIVE FUTURES FOR THE ACADEMY

We move now to the two most difficult questions involved in this appraisal: (1) What **should** be the future of the Academy? (2) How **should** the Academy fit into the larger scheme of things?

Because these are "should" questions, inviting normative judgments or prescriptions, it must not be assumed that they can be answered unequivocally by the data. Answers must be based largely upon opinions -- of participants, of observers, and of experts; and the best the data can do is inform opinions -- not determine them.

Our objectives as we moved into this phase of the investigation were:

1. To conceive of alternative scenarios in regard to the future of the Academy.
2. To test each of these alternatives for robustness -- both in terms of qualitative viability and political feasibility.
3. To attempt to arrive at the best choice -- again in consideration both of appraisive data and of the opinions of various groups.

The methods we employed as we approached these objectives were:

1. To assemble the available data in such a way as to make them as useful as possible in informing opinions.
2. To meet with the various stakeholder groups and ask them to assist by:

1. identifying alternative futures; and
2. assessing each for robustness and acceptability.

3. To synthesize the views of all contributors and attempt to arrive at a final judgment.

1. Summary of Opinion-Informing Data

Five types of data were deemed to be instructive to stakeholder groups as they approached the tasks of conceiving of alternative futures for the Academy and of choosing a particular future: (1) data on the perceived effectiveness of the Academy to date; (2) data on participants' views of the Academy experience in comparison to other professional development experiences; (3) data on the views of superintendents about the role of the Academy; (4) data on the views of trustees on the role of the Academy; and (5) information about some other recent developments -- such as the FELA proposal and the proposed Consortium.

- **Data About Academy Effectiveness.** In section II of this report, we documented the perceptions of participants and superintendents regarding the effectiveness of Academy programs as opportunities for leadership development. We have attempted to aggregate these data for purposes of offering over-all impressions. On a scale of 1 to 10 the aggregated perceptions are:

1. Participants	9.4
2. Superintendents	8.5

- **Comparative Data.** Participants were asked to rate the Academy experience in comparison to other professional development activities in which they had engaged. The top five, with weighted mean values on a three-point scale, were as follows:

1. Academy Programs	2.9
2. Other Self-Initiated Activity	2.6
3. District-Sponsored Programs	2.5
4. Readings	2.5
5. University Programs	2.4

• **Data From Superintendents.** Superintendents were asked, not only to judge the Academy's effectiveness in terms of its impact upon their principals, but also to comment upon the desirability of the Academy expanding its scope to sponsor programs for superintendents.

The responses were as follows:

No	35	(42.1%)
Yes	33	(39.8%)
Qualified Yes/No	11	(13.3%)
Uncertain	4	(4.8%)

Most of those who said "no" proceeded to indicate that they viewed the professional development of superintendents purely as "the responsibility and prerogative of CASS -- not the ASTA or any other agency." Most of those who said "yes" suggested that "since the Academy has been such a success for principals, it could very likely serve superintendents too." The qualified responses led to such comments as: "Only if CASS plans the program. Only if it is not tied too closely to the ASTA. Only as one of many activities."

• **Data From And About Trustees.** We distributed a brief questionnaire to the 34 school board chairmen and vice-chairmen who attended the program especially designed for them in 1985. Twenty-one completed and returned the

questionnaire for a response rate of 62%. Though this response rate is marginal as a basis for drawing conclusions, we were able to use it as a supplement to the earlier evaluation conducted at the conclusion of the trustees' program. In the earlier, post-program evaluation the general ratings were favourable: goal achievement -- 4.2 on a 5-point scale; program effectiveness -- 4.23 on a 5-point scale; program themes -- 3.47 on a 4-point scale; and processes -- 3.27 on a 4-point scale.

Of particular interest to us here, however, were the trustees' responses to two other questions:

First, when asked if the Academy experience was likely to be useful in future endeavors, the response was an unanimous "yes." Similarly, when asked if they would recommend an Academy experience to a colleague, the response was a unanimous "yes."

Our follow-up survey indicates that there was little if any slippage in the participating trustees' views. They continue to value the experience and they continue to believe (again unanimously) that the program should be repeated for other trustees.

Finally, we asked the school board chairmen and vice-chairmen if their Academy experience had caused them to encourage the attendance of principals in their jurisdictions. Thirteen said "yes." One said "no -- because our Division has other plans." Two said "no -- but I would, if asked."

Our questionnaire to superintendents asked if their board chairman or vice-chairman had attended the program and, if so, whether or not it had had observable effects. Superintendents reported knowing about only 14 attendees. In seven cases they reported very positive results particularly in terms of personal

growth; in four cases, they reported no observable impact; and in three cases they reported quite negative impacts -- using such terms as "indoctrination," the "touchy-feely process" and "poor leadership."

- **Other Relevant Developments.** Though the Academy is guided by a Policy Steering Committee made up of representatives of all stakeholder groups, it is nevertheless generally perceived as a creature of the ASTA. Some people are not bothered by this; others are. Some applaud the ASTA's initiative; others wonder about its motives. Some say, if the Academy is a success, let it flourish and expand its scope; others say the "Academy concept" should expand only if all stakeholder groups are equal partners in the venture.

In January, 1986, a proposal for the establishment of a Foundation for Educational Leadership in Alberta (FELA) was considered in a meeting of the various stakeholder groups. That meeting resulted in the creation of a study group to consider the ideas of the FELA proposal and to recommend action.

The study group moved beyond the FELA proposal and proposed instead the creation of a Consortium for the Development of Leadership in Education (CDLE). The study group has submitted its report; the proposal includes a number of relevant suggestions: (1) that the Consortium become the umbrella organization that would subsume a variety of programs, including the Academy; (2) that the Consortium be a "non-profit organization" governed by a Board of Directors, each member a nominee of a member organization; and (3) that the Consortium be a coordinating, enabling and support agency whose mandate would be to promote and facilitate leadership development activities of all sorts and for all groups in the Province.

2. The Future of the Academy: A Framework For Judgment

As one contemplates the future of the Alberta Academy for Educational Leadership, one must take account of three major factors: (1) the **scope** of the Acdemy's activities, (2) the **role** of the Academy in future leadership development ventures; and (3) the structures of **governance** that might be contemplated. Each of these factors deserves some deliberation before alternative futures can be considered:

Scope. To date, the Acdemy has concentrated upon leadership development programs for principals -- though one exploratory program was also offered for school board chairmen and vice-chairmen.

Some observers ask: If it is successful for principals, why not for superintendents, for school business officials, for trustees, and for whomever? But this question, according to our data, can only be addressed in the context of other variables.

Role. Many respondents indicated to us that they would be pleased to see the Academy expand its scope, to include any and all leaders in the educational enterprise -- provided it was willing to alter its role. What they seemed to be saying was this: "We would support an expansion in scope (to accommodate all leaders) provided the Academy would change its role from one of program planning and management to one of facilitation."

Governance. The final, closely-entwined factor has to do with "Who is in charge?" Again our evidence suggests that most educational leaders are complimentary and appreciative of the work of the Academy. But they are uneasy about its governance. Why, they ask, is it sponsored, planned and directed by the ASTA?

The alternative scenarios that are developed for consideration must take account of these three critical factors: scope, role, and governance -- for some alternatives would inevitably be rejected on the basis of inappropriate scope; others would be rejected on the basis of inappropriate role; and still others would be rejected on the basis of inappropriate forms of governance.

Only an imaginative and appealing mix of these variables could withstand the test of political feasibility. So the question is: how does one get the variables in the kind of perspective that would aid judgment?

3. The Future of The Academy: Alternative Scenarios

As one contemplates the possible mixes of scope, role and governance variables, one realizes that three questions need to be addressed:

1. Should the Academy expand its scope and, if so, how far -- to include Trustees? Business officials? Superintendents? Others?

2. If the scope is to be expanded, what should be the Academy's role? Planning and management, as it now is? Or only facilitation and support services?

3. And if the scope is expanded and the role clarified, then what should be the locus of governance? ASTA as it now is? A consortium? Or what?

Given the above conceptualization and questions, seven alternative scenarios come to mind:

#1. The Status Quo. In this alternative, the Academy would remain autonomous and entrepreneurial. It would cater largely to principals; it would retain its role as planner and operator of programs; and it would continue to function as an agent of the ASTA.

#2. Sponsorship Shift. In this alternative, the Academy would remain autonomous and entrepreneurial. It would cater largely to principals; it would retain its role as planner and operator of programs; however, sponsorship of the Academy would shift from the ASTA to one of the other existing agencies or organizations.

#3. Expanded Scope. In this alternative, the Academy would attempt -- again autonomously and entrepreneurially -- to cater to other groups: business officials, superintendents, trustees and others. Sponsorship would be either as in alternative #1 or #2.

#4. Expanded Scope -- But Limited Role. In this alternative, the Academy would expand its scope as in #3 above -- but as it did so, would alter its role from planning and control to facilitation and support. It would be the umbrella organization under which others would operate their own programs.

#5. Split Governance. In this alternative the concept of operating summer workshops similar in design to the present Academy would continue, but sponsorship of the workshop for each client group would be the responsibility of the most appropriate organization(s) -- Trustees' "Academy" (ASTA), Superintendents' "Academy" (CASS and CSA), Principals' "Academy" (CSA and ATA), and School Business Officials' "Academy" (ASBOA). There would be no umbrella organization.

#6. Shared Governance. In this alternative the concept of operating summer workshops similar in design to the present Academy would continue, and might even expand; however, the governance would shift from the ASTA to a consortium or other like agency which would have as its mandate the facilitation and coordination of a much wider range of leadership development activities.

#7. Cease Operations. In this alternative, the Academy would simply decide that it has gone as far as it should in its pioneering venture and step aside to

allow other agencies to pick up the responsibilities.

4. The Views of Stakeholder Groups

We met with representatives of six major stakeholder groups: (1) The Alberta Teachers' Association (ATA); (2) The Alberta School Trustees' Association (ASTA); (3) The Association of School Business Officials of Alberta (ASBOA); (4) The Council on School Administration (CSA); (5) The Council of Alberta School Superintendents (CASS); and (6) the Policy Advisory Committee of the Academy.

Each group was first given a summary of the appraisive data and an overview of the seven alternative scenarios described above. Then we asked:

- What are your general impressions of the Academy as you know it and in light of the appraisive data?
- What should be the future of the Academy? What would be your choice from among the alternative scenarios offered? Or any other?

1. The Alberta Teachers' Association (ATA). The President, the Table Officers, and the Executive Secretary of the ATA declared themselves unable to provide us with "an official ATA position" on the Academy. They did, however, share with us a number of important observations and their preferred choices.

- **General Observations of the ATA.**
  1. The ATA does not regard the provision of leadership development opportunities to be a proper function of the ASTA. Instead, leadership development is best viewed as a professional responsibility -- to be sponsored by the profession. Furthermore, leadership development programs should not be directed exclusively to administrators; they should be available to all educators.

  2. The ATA views the Academy as "a creature" of the ASTA -- and particularly as an enterprise assigned to a senior official of the ASTA. In light of the view expressed in #1 above, the ATA believes the Academy, as presently conceived, cannot and should not survive beyond the exploratory phase.

3. The ATA perceives the Academy to be "management-oriented," inasmuch as its philosophy and methods suggest that the principal's function is to direct teachers and manipulate them into particular behaviour patterns. This view is offensive to teachers; it is a denial of the collegial mode of operating a school.

- **Preferred Alternatives.**
  1. The ATA's first choice was our alternative #6 -- namely shared governance. In this alternative, the proposed Consortium would become the locus of governance -- and the one-week leadership development program for principals (as exemplified in Academy programs) would become merely one possibility in a wider spectrum of leadership development activities.

  2. The second choice was our alternative #2 -- namely that sponsorship of the Academy shift from the ASTA to other appropriate agencies.

  3. The third choice was our alternative #7 -- namely that the Academy cease operations.

It was abundantly clear from our conversations with the representatives of the ATA that: (1) there is resentment toward key personnel in the Academy enterprise; (2) there is indignation that an association of educational policy makers (ASTA) "would presume" to offer professional development activities for professionals; and (3) there is suspicion that the motive of the ASTA is "to turn principals into management personnel."

Of particular note in the ATA's discussions with us was the explanation of members' first choice from among the alternative scenarios: the ATA has already endorsed, in principle, the proposed Consortium on Educational Leadership.

2. The Association of School Business Officials of Alberta (ASBOA). We met with the Vice President, Professional Development, of ASBOA to obtain the views of the Association with respect to the future of the Academy and how it might fit in the larger scheme of things from an ASBOA perspective. Several points become immediately clear:

- **General Comments of ASBOA**

1. ASBOA has a continuing commitment to the University of Alberta Extension Department's Senior Executive Fellowship Program. ASBOA wishes to see this program expand -- with offerings in centres other than Edmonton and with offerings that meet the needs of all senior personnel in local government.

2. Ultimately, ASBOA would like to see the development of a "College" for all personnel in senior positions in local government.

3. The Academy, accordingly, might become only one of several opportunities for the professional development of school business officials. Indeed, if the Academy proceeds to offer two programs for school business officials in 1987-88, as ASBOA hopes it will, then the Academy's services might not be needed for about five years thereafter. (These two proposed programs, incidentally, have now been accredited by the U. of A. as portions of the Executive Fellowship Program.)

- **Preferred Alternatives.**

When pressed to advise us on the preferred alternatives, the ASBOA representative was unequivocal in his judgments. We quote: "The Academy has proven itself; it should continue. In our dealing with the Academy, it has already demonstrated its ability to expand its scope and alter its role; our people are planning our program. The Director of the Academy is simply the facilitator -- not the planner or manager. We have arranged for an Academy program to be accredited by the U. of A. as a legitimate part of our Senior Executive Fellowship Program. So we like it as it is. Hence, our preferred alternative would be:

1. **First Choice -- The Status Quo with an Expanded Scope** (a combination of our alternatives #1 and #3). In this alternative, the Academy would proceed -- as it now does -- to plan, in collaboration with ASBOA, two leadership development programs for school business officials. Then ASBOA might wait for up to five years before again turning to the Academy for service.

2. **Second Choice -- Shared Governance.** ASBOA does not see any great advantage, for its members, in the creation of the proposed Consortium; its affiliations tend to be with other local government personnel -- not with educational administrators. However, if the Consortium is seen as a way of expanding professional development opportunities for other groups -- while at the same time protecting the concept of an Academy -- the ASBOA would not oppose such a move. Indeed, the Association would probably take on a

membership.

The Alberta School Trustees' Association (ASTA). The Table Officers and Executive Secretary of the ASTA reacted to our appraisive data and gave a unanimous opinion regarding the preferred option.

- **General Comments of the ASTA**

  1. The Association is pleased that it chose to sponsor the Academy -- despite the fact that there was some opposition from the outset.

  2. Now that the Association has been apprised of the appraisive data, it is of the strong opinion that the idea behind Academy programs must not be lost. Such programs are needed.

  3. However, in reassessing its position, now that the three-year exploratory period is over, the ASTA has two concerns: (1) the venture has been costly in terms of staff time and effort and in terms of dollar investments; and (2) since the ASTA sponsorship of the Academy appears to continue to invoke the resentment of other stakeholder groups, it may be time to consider other sponsorship and other modes of governance.

- **Preferred Alternatives**

  The ASTA Table Officers selected our Alternative **#6 -- Shared Governance** -- as their preferred choice. They are now prepared to see the operation of summer workshops similar in design to those offered by the Academy come under a governance structure such as the one embodied in the proposed Consortium.

4. The Council on School Administration. The spokesperson for CSA had experienced an Academy program and had discussed the future of the Academy with colleagues.

- **General Comments of the CSA.**

  1. The Academy experience is, indeed, useful and enjoyable -- but it has its limitations. Its major values are in the sharing of ideas, in the building of self-esteem, motivation and confidence. The concerns the CSA has relate to: (1) a possible shallowness in content; (2) the "zeal" that builds; and (3) the nature and intent of follow-up reunions.

  2. CSA regards the Academy experience as only one approach (an

important one, but not an exclusive one) to leadership development.

- **Preferred Alternative.**
  CSA endorses the Consortium proposal as the only alternative. In this alternative, a network of activities and opportunities (including future Academies) would be properly coordinated; all organizations would come together; and the efforts of each of the organizations would be supported and advanced as part of the larger scheme of things.

5. The Council of Alberta School Superintendents (CASS). We obtained a fairly clear view of the Superintendents' position through our questionnaire survey. Superintendents said: (1) there is no doubt that the Academy programs have been useful to our principals; we hope they will continue; but (2) if the Academy plans to expand its scope to the provision of services for other leadership personnel, including superintendents, then we have some reservations -- namely, unless CASS has a strong hand in setting themes, planning programs, and selecting personnel, we are not interested.

Our meeting with CASS representatives corroborated these findings.

- **Preferred Alternative.**
  CASS is on record as favoring the creation and development of the proposed Consortium. CASS appears to believe that the Consortium would provide the needed support for professional development activities for its members -- while at the same time, allowing the Association to determine its own needs, plan its own programs, and select its own facilitating agency -- the Academy or whatever.

6. The Academy Policy Advisory Committee. The Advisory Committee, though representative of all stakeholder groups, chose only: (1) to receive the appraisive data; (2) to discuss the alternatives; but (3) to refrain from adopting a position. Indeed, because planning for the Academy's 1987 programs is already well underway, the committee decided to proceed with its plans and reassess its position after the final report on the Academy is available for review and the 1987 programs have

been completed.

IV.

SUMMARY, SPECULATIONS AND RECOMMENDATIONS

We have assembled a broad array of data -- data which should now serve to inform our final judgments and guide our recommendations. The data include: (1) descriptions of the Academy; (2) appraisals by participants and their immediate supervisors; (3) the judgments of observers; (4) guidelines from the experts, as reflected in the literature; and (5) the opinions of various stakeholder groups as to how the Alberta Academy should attempt to shape its future.

In general, the Academy programs offered over the three-year exploratory period are viewed as outstanding successes. Yet there appears to be rather widespread uneasiness about the prospect of the Academy proceeding as presently constituted. Therein lies the dilemma to be faced in this concluding section: How to reconcile the competing views of: (1) those who are impressed with the Academy's successes and wish to see it flourish in the future; and (2) those who believe the Academy is inappropriately located and, hence, if it is to continue at all, wish to see it's locus and the form of it's governance drastically altered.

We think the pathway to the resolution of this dilemma is clear -- though, at the outset, it may not be a particularly attractive pathway for some individuals to embark upon. We lead up to our recommendations, therefore, first, with a brief summary of the appraisal and, second, with some speculations about contemporary views of participant involvement and how these views may be used to separate the acceptable from the unacceptable.

1. Summary of Findings.

- The programs offered by the Academy during the three-year exploratory period appear to have been unqualified successes -- in the views of participants, supervisors, and experts. (We think the ASTA and the Director of the Academy are to be commended for undertaking this pioneering venture and for demonstrating that Academy programs do, indeed, meet a need.)

- Like any other human endeavor, however, the Academy does not meet all the expectations of all participants, all the hopes of all the supervisors, or all the guidelines proposed by experts. (Some fine-tuning of programs may be in order.)

- The general reactions to the Academy, as expressed by the various stakeholder groups, differ markedly. But whether they are positive or negative about the Academy, the stakeholders agree on one point: it is now time for the ASTA to step aside on the over-all governance of the Academy and allow that function to be subsumed by a more broadly-based group

2. Speculations.

There was a time (the time which Gordon McIntosh has referred to as the "Golden Age" of educational leadership) when the informal network of stakeholder groups -- and the trust that existed among them -- was such as to ensure that no one group would seriously think that another group might usurp its prerogatives. That is no longer the case. The reality is that the informal network has crumbled; trust has faded; and there are suspicions that various groups are in the game of out-maneuvering each other.

As a result, it is seen as intolerable for any one group to "take over" anything from another; for any one group to presume to do anything for or to

another; or for any one group to act on a matter of mutual interest without the involvement and approval of others.

All of this is simiply a manifestation of the politicization of education that has developed over the past few years. Some think it is deplorable; others think it is democratic and healthy. Whatever one's judgment, the fact of the development cannot be denied. It is a part of every-day policy making in education!

It should not come as a surprise, therefore, that, although the report card on the Academy's effectiveness is a very good one, stakeholder groups are uneasy (in some cases, downright resentful) about the location of the Academy and its governance.

We think that two imperatives arise from these findings -- first, that Academy-like programs be continued and allowed to flourish; but second, that conflict and resentment be avoided through the involvement of all groups in the Academy's sponsorship.

3. Recommendations.

Our data are suggestive of two types of recommendations: (1) some having to do with the planning and operations of the Academy; and (2) others having to do with the governance of the Academy.

1. Planning and Operations of the Academy. There are modest suggestions throughout the appraisive data that the Academy, in the view of some, may be inclined to adopt a somewhat narrow view of leadership and leadership development and as a result may tend: (1) to emphasize some aspects of leadership (the symbolic and transformational) and deemphasize others (the substantive and the qualities and tasks of leadership); and (2) to emphasize certain aspects of leadership

development (confidence-building, personal development, and feeling) and deemphasize others (competence-building, supervisory skills, and knowing.)

These observations led some respondents to suggest that, in future, the Academy's programs should be more targeted both on certain aspects of leadership and on the needs of particular individuals.

We are not so sure. If the Academy programs were the only leadership development activity available to individuals we would agree: it ought to become more comprehensive; it ought to do other things; indeed, it ought to attempt to do all things for all people.

But we tend (as do many of our respondents) to view Academy programs as but one of many types of leadership development opportunities that are available, or should be available, to educational leaders. Accordingly, we think the Academy may well be advised to preserve, to promote and to sharpen the identity that it has already begun to establish. Specifically, we recommend:

Recommendation #1 -- Identity: That the Directorate and the Policy Advisory Committee undertake a reexamination of the philosophy, the goals and the processes which constitute the "Academy Way;" and that a definitive statement then be developed outlining which goals the Academy pursues and which it does not, and which guiding beliefs are central to its leadership development process, and which are not.

Recommendation #2 -- Complementarity: That the Directorate and Policy Advisory Committee undertake a review of recruitment processes with a view to setting a definitive policy as to the sorts of clients the Academy aims to serve and the way in which Academy services are intended to complement, supplement, extend, or build upon the services offered through other programs.

There are all sorts of hints, indeed suggestions, in the data as to how one might proceed to fine-tune Academy programs. For example, such suggestions as the following were made: (1) slacken the pace; (2) provide more time for recreation; (3) be more serious about substance -- as, for example, in text-book discussion; (4) introduce more flexibility into grouping; and (5) change some of the time allocations.

We take no position on these and other suggestions regarding the programs, themselves -- for, we think, that when recommendations 1 and 2 above have been addressed, it will become perfectly clear what kinds of program modifications the Directorate will wish to initiate. Hence, we simply recommend as follows:

Recommendation #3 -- Fine Tuning: That the Directorate, in light of the policies established in accordance with recommendations #1 and #2 above, review the suggestions provided by our respondents and determine which fit and which do not fit with established policies; and that the process of fine-tuning proceed accordingly.

2. Governance of the Academy. The opinion-data we were able to assemble with respect to the Academy's future (and its form of governance) were the most unequivocal data of all. Though there were differences in views and reasons for the positions taken, the six stakeholder groups we interviewed came to one dominant opinion. In light of that dominant opinion (reported in Section III) and our speculations about the politics of the possible (presented briefly in Section IV.2.) we recommend as follows.

Recommendation #4 -- Locus of Governance: That the ASTA declare its intention to relinquish the sponsorship and governance of the Academy programs.

Recommendation #5 -- Divesting Procedures: That the ASTA declare itself in favour of Academy programs being subsumed under the umbrella of the proposed Consortium for the Development of Leadership in Education; that the ASTA continue to give moral support to Academy-type programs; but that, at an appropriate time, the ASTA request that the Consortium subsume the Academy programs and aid their planners in their quest for identity and for a "fit" in the broader spectrum of leadership development programs.

4. Concluding Thoughts.

Some readers may view our recommendations as brief and sketchy. They are -- and deliberately so. For our motives are correspondingly simple:

1. To attempt to ensure that Academy-like programs are refined, protected and perpetuated. (The impacts of these programs have been such that it would be sheer folly to allow them to fade now that the exploratory period is over.)

2. To attempt to put to rest the uneasiness that is generated by the locus and form of the Academy's governance. (Too many good ideas in education flounder on political hurdles; pioneering programs of professional development should not be allowed to be one of them.)

3. To attempt to add some impetus to an idea which could, at once, preserve the idea of Academy-like programs and promote other approaches to leadership development. (We deliberately endorse the proposal for the creation of the Leadership Development Consortium; we urge the architects of the proposal to persist in their efforts to bring it to reality.)

We have listened carefully to all who would advise us on the quality and future of the Academy programs. We think we have brought some order to the diverse views that were presented to us. We hope that all parties will now join together in moving to the next era in the provision of leadership development opportunities.